Saskatchewan
Tourism and
Small Business

TRAVEL MARKETS FOR SASKATCHEWAN'S TOURISM INDUSTRY

ONTARIO REPORT

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EXECUTIVE SUMMARY

This report describes a number of characteristics typical of the Ontario out-of-province travel market and examines Saskatchewan's past, current and future projected performance in this market in terms of market share and market image.

Saskatchewan captures about 2% of the out-of-province travel by Ontarians within Canada and appears to be marginally increasing its market share of the Ontario market, or at least maintaining its share.

This study observes that Ontario residents are interested in a broad range of pleasure travel activities such as rural and urban sightseeing, visiting historic sites/museums, attending festivals/events, camping, fishing, hiking, wilderness canoeing and other activities. Many of these activities could be pursued in Saskatchewan.

Ontarians tend to primarily visit Saskatchewan for purposes of friends and relatives, followed by rural/urban sightseeing, camping, fishing, hiking and wilderness canoeing. Saskatchewan's image in the Ontario marketplace is not well-defined and Saskatchewan's historic and cultural resources have not been developed to significantly appeal to the Ontario traveller who is more sophisticated than the Alberta or Manitoba traveller.

Forecasts of the potential travel volumes to Saskatchewan from Ontario suggest an increase from 75,000 person-trips in 1982, to between 90,000 and 100,000 person-trips by 1987 - dependent on the type and intensity of the department's marketing/promotional campaign in the Ontario marketplace.

1.0 EXISTING OUT-OF-PROVINCE TRAVEL PROFILE OF ONTARIO RESIDETNS

1.1 Market Size

The Ontario market generates approximately 3,857,000 out-of-province trips annually to other Canadian provinces. Table 1 shows the distribution of these person-trips in terms of the 1982 Canadian Travel Survey Estimates for selected destinations as compared to those reported in the 1983 Mid-Continent Research, Inc study of the Ontario market.

TABLE 1

Distribution of Out-of-Province Trips Taken in Canada by Residents of Ontario

	1982 Person Trips[1]	Percent	Ontario Residents Who Have Travelled to These Destinations Between 1980-83[2]
Saskatchewan	75,000[3]	2%	13%
Manitoba	284,000	7%	15%
Alberta	206,000	5%	26%
British Columbia	263,000	7%	25%
Quebec	2,493,000	65%	37%
Nova Scotia	213,000	6%	17%

[1]Canadian Travel Survey, 1982.
[2]Mid-Continent Research, Inc. study of the Ontario market.
[3]75,000 person-trips had Saskatchewan as their main destination. An additional 63,000 person-trips involved Saskatchewan as an interim destination for at least one night.

The comparison of these two sources reveals that Saskatchewan currently does not capture a significant portion of the Ontario out-of-province travel market as compared to such other western provinces as Alberta and British Columbia. For example, 26% of Ontario out-of-province trips in the past three years were to Alberta and 25% to British Columbia. Saskatchewan captured only 13% of the Ontario traffic in the same time period.

1.2 Market Characteristics

1.2.1 Trip Purpose

The majority of out-of-province trips taken by Ontario residents are for pleasure travel purposes. As shown in Table 2, trips taken for pleasure purposes amount to 71% of all trips taken. Ontario residents have a higher propensity to take pleasure trips than do residents of British Columbia, Alberta or Manitoba. Travel for purposes of visiting friends and/or relatives is second in importance with the Ontario market.

TABLE 2

Main Reason for Trips by Ontario, British Columbia, Alberta and Manitoba Residents[1]

Trip Purpose	Ontario[2] 1980-1983	British Columbia[3] 1981-1984	Alberta[3] 1981-1984	Manitoba[3] 1981-1984
Pleasure	71%	53.4%	60.1%	50.0%
Visiting Friends/Relatives	23%	24.7%	20.2%	24.2%
Both Business and Pleasure	12%	10.0%	10.3%	18.3%
Business	1%	6.0%	3.6%	6.3%
Other	1%	6.0%	6.0%	1.2%

[1]Percentages may not add to 100% due to rounding or multiple responses.
[2]Mid-Continent Research, Inc. study of the Ontario market.
[3]Derek Murray Consulting and Associates Inc. study of the British Columbia, Alberta and Manitoba markets.

1.2.2 Activities Pursued on Pleasure Trips

Table 3 shows the relative popularity of 19 major activities often pursued by tourists of Ontario, British Columbia, Alberta and Manitoba on pleasure trips. Of all the pleasure activities listed, the five most popular with Ontario travellers include rural sightseeing, historical sites/museums, urban sightseeing, festivals or special events, and musical events or live theatre.

While these activities are also the five most popular with travellers from British Columbia, Alberta and Manitoba, significant differences do exist among Ontario travellers for other activities.

Ontario travellers are much less interested in camping (36%), fishing (22%), sporting events (32%), hiking (29%), game bird hunting (8%) and big game hunting (7%).

TABLE 3

Specific Interests of Ontario, British Columbia, Alberta and Manitoba Travellers on Pleasure Trips

Trip Purpose	All Province Average[1]	Ontario[2]	British Columbia[3]	Alberta[3]	Manitoba[3]
Rural Sightseeing	84%	81%	84%	85%	87%
Historical Sites/Museums	79%	78%	81%	78%	79%
Urban Sightseeing	79%	79%	79%	77%	80%
Festivals/Special Events	66%	68%	66%	65%	66%
Musical Events/Live Theatre	55%	61%	53%	52%	53%
Craft/Art Fairs	44%	47%	45%	42%	42%
Camping	57%	36%	63%	69%	59%
Water Sports	52%	40%	57%	57%	52%
Sporting Events	50%	32%	54%	57%	57%
Hiking	41%	29%	45%	51%	37%
Fishing	41%	22%	47%	48%	48%
Industrial Tours	29%	22%	30%	29%	33%
Downhill Skiing	29%	17%	32%	38%	27%
Sailing	23%	22%	23%	27%	18%
Wilderness Canoeing	21%	19%	21%	20%	22%
Cross-Country Skiing	25%	18%	26%	28%	28%
Snowmobiling	21%	13%	22%	23%	27%
Hunting Game Bird	16%	8%	17%	18%	21%
Hunting Big Game	17%	7%	19%	21%	21%

[1]Average for all four provinces.
[2]Mid-Continent Research, Inc. study of the Ontario market.
[3]Derek Murray and Associates Inc. study British Columbia, Alberta and Manitoba markets.

1.2.3 Trip Frequency, Length of Stay and Seasonal Distribution

As a rule, Western Canadians take more out-of-province trips in Canada than do residents of Eastern Canada as Table 4 illustrates.

TABLE 4

Out-of-Province Trips Taken Per Capita by Residents of Selected Provinces, 1982 to Canadian Destinations

Province	Total Person-Trips[1] Taken Out-of-Province	Population[2] 1982	Annual Out-of-Province Trips Per Capita	Rank
Alberta	2,611,000	2,318,700	1.13	1
Saskatchewan	1,044,000	979,200	1.06	2
Manitoba	1,053,000	1,034,600	1.02	3
British Columbia	1,253,000	2,791,400	0.45	4
Ontario	3,857,000	8,717,000	0.44	5

[1]1982 Canadian Travel Survey.
[2]Statistics Canada.

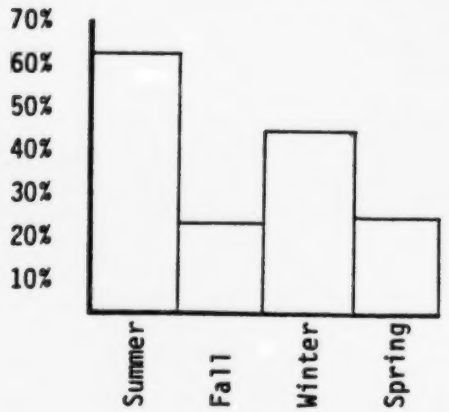
Ontario and British Columbia tend to take the same amount of trips per capita to Canadian destinations.

Figure 1 shows the seasonal distribution of pleasure trips taken annually by Ontario residents. Summer months are the most popular times for pleasure travel followed by winter, spring and fall in that order. The percentage breakdown of pleasure trips taken by Ontario travellers during the four seasons is as follows:

Summer	62%
Fall	23%
Winter	45%
Spring	24%

FIGURE 1

Seasonal Distribution of Pleasure Trips Taken Annually by Ontario Travellers



The majority of Ontario residents undertake one pleasure trip annually of four or more nights duration.

TABLE 5

Percentage Distribution of the Number of Annual Pleasure Trips of Four or More Nights Duration by Residents of Ontario, B.C., Alberta and Manitoba

Number of Pleasure Trips of 4+ Nights	All Province Average[1]	Ontario[2]	B.C.[3]	Alberta[3]	Manitoba[3]
0	5%	7%	4%	2%	6%
1	40%	40%	38%	40%	44%
2	27%	25%	29%	28%	25%
3	14%	15%	13%	15%	12%
4	6%	5%	6%	7%	6%
5 or more	7%	8%	8%	8%	6%

[1]Average for all four provinces.
[2]Mid-Continent Research, Inc. study of the Ontario market.
[3]Derek Murray and Associates Inc. study of British Columbia, Alberta and Manitoba markets.

1.2.4 Transportation Modes for Pleasure Travel

Ontario travellers for long distance trips prefer using the airplane when on a pleasure trip.

TABLE 6

Modes of Transportation Used by Ontario, B.C., Alberta and Manitoba Residents on Long Distance Out-of-Province Pleasure Trips[1]

Transportation Mode	All Province Average[2]	Ontario[3]	B.C.[4]	Alberta[4]	Manitoba[4]
Automobile	37%	26%	33%	47%	43%
Airplane	51%	82%	49%	36%	35%
Train	4%	8%	-	2%	5%
Bus	3%	7%	3%	1%	2%
Motorhome	1%	-	3%	1%	1%
Fly/Drive	n/a	n/a	7%	8%	6%
Motorcycle	n/a	n/a	1%	1%	1%
Other	n/a	6%	-	-	-

[1]Percentages may not add up to 100% due to more than one mode of transportation used.
[2]Average for all four provinces.
[3]Mid-Continent Research, Inc. study of the Ontario market.
[4]Derek Murray and Associates Inc. study of British Columbia, Alberta and Manitoba markets.

1.2.5 Accommodation Used on Pleasure Trips

Table 7 displays the type of accommodation used by Ontario travellers when on pleasure trips. Hotels and motels are the dominant type of accommodation (47%) used by Ontario travellers.

Ontario travellers typically stay in hotels and motels but are also about as likely to stay with friends and relatives as compared to B.C. or Manitoba travellers.

TABLE 7

Accommodation Used by Ontario, B.C., Alberta and Manitoba Travellers on Pleasure Trips

Type of Accommodation	All Province Average[1]	Ontario[2]	B.C.[3]	Alberta[3]	Manitoba[3]
Hotels/Motels	44%	47%	43%	46%	40%
Friends/Relatives	37%	42%	35%	32%	40%
Camping	10%	4%	13%	12%	11%
Resorts	4%	4%	3%	2%	5%
Bed-Breakfast	2%	3%	1%	2%	1%

[1]Average for all four provinces.
[2]Mid-Continent Research, Inc. study of the Ontario market.
[3]Derek Murray and Associates Inc. market studies of British Columbia, Alberta and Manitoba markets.

Camping is the most significant difference in the type of accommodation used by Ontario travellers as opposed to Western Canada pleasure travellers. Only 4% of Ontario travellers use campgrounds as compared to the Western Canada three-province average of 12%. Ontario residents, as has been shown earlier, are much less interested in camping as an activity on a pleasure trip than travellers from Western Canada.

1.2.6 Trip Planning Behaviour by Ontario Residents

The main months in which Ontario residents start planning their summer pleasure trips are February, March and June. However, June is the primary month in which Ontario travellers decide on their destination. Table 8 further illustrates when summer trips are planned and when a decision on destination is made.

It is interesting to note that 38% of Ontario travellers do not plan on taking a summer pleasure trip.

TABLE 8

Summer Trip Planning and Trip Destination Decision by Ontario Residents

Month	Month When Summer Trip is Planned	Month	Month When Destination is Decided for Summer Trip
January	6%	January	1%
February	8%	February	4%
March	8%	March	5%
April	7%	April	9%
May	7%	May	9%
June	8%	June	12%
July	5%	July	10%
August	-	August	1%
September	3%	September	1%
October	3%	October	1%
November	1%	November	2%
December	2%	December	-
Don't Know	5%	Don't Know	6%
Do Not Take Summer Pleasure Trip	38%	Do Not Take Summer Pleasure Trip	38%

The pattern of who makes decisions about a vacation destination in Ontario are somewhat different to the patterns found in B.C., Manitoba or Alberta. The husband and wife jointly decide in 43% of the households, the whole family deciding in about 8% of the households, the male head deciding in 6%, and the female head in 18% of the households. The major difference between Western Canada and Ontario is that the female head plays a substantially greater role in the vacation decision process.

Table 9 shows that Ontario residents have a greater tendency to use travel agents to plan vacations relative to Manitoba, Alberta and even British Columbia.

For those who use travel agents, convenience and need for information and guidance were the primary reasons for using travel agents.

TABLE 9

Use of Travel Agents and Packaged Tours
by Ontario Travellers

Use of Travel Agents in Past 3 Years to Plan/Arrange Pleasure Trips

Yes = 68% No = 32%

Reasons Why:

Convenience	29%
Information/Guidance	19%
Cheap Trip	8%
Know Agent	7%
Air Ticket and Hotel Reservation	2%
Other/Not Sure	16%
Did Not Use Travel Agent	32%

Use of Package Tours in Past 3 Years

Yes = 30% No/No Answer = 70%

Reasons Why:

More Economical	13%
Convenience	8%
Pre-Arranged	8%
Group Tour	2%
Other/Not Sure	6%
Did Not Use Package	70%

2.0 PERFORMANCE OF THE SASKATCHEWAN TOURISM INDUSTRY IN THE ONTARIO MARKETPLACE

2.1 Saskatchewan's Market Share of Ontario Out-of-Province Travellers to Canadian Destinations

According to the 1980 Canadian Travel Survey, Ontario residents undertook 3,794,000 out-of-province person-trips to other Canadian destinations. Saskatchewan captured 64,000 person-trips or 1.7% market share. In 1982, Saskatchewan's share of the Ontario market was 2% or 75,000 person-trips(1) of Ontario travellers to Canadian destinations. Ontario residents in 1982, undertook 3,857,000 person-trips to other Canadian provinces. In effect, between 1980 and 1982, Saskatchewan had increased its share of the Ontario market very marginally.

2.2 Primary Travel Motivators in the Ontario Market

Visiting friends or relatives is typically the single most common motivator associated with travel by Ontario residents. Other popular travel motivators include shopping, sightseeing, attending cultural events, nightlife/recreational activities, visiting zoos, historic sites, natural displays, attending sports events and hunting or fishing. The trip motivators are outlined in Table 10.

TABLE 10

Selected Travel Motivators/Activities of Ontario Travellers to Canadian Destinations

Motivators/Activities	Ontario Travellers[1]
Visiting Friends/Relatives	50.7%
Shopping	25.9%
Sightseeing	18.3%
Attend Cultural Events	4.4%
Nightlife/Recreational Activities	13.5%
Visit Zoo/Historic Site/Natural Display	6.3%
Attend Sports Events	5.1%
Hunting or Fishing	7.9%

[1]Percentages do not add to 100% since more than one travel motivator /activity is required to induce travel.

Source: 1982 Canadian Travel Survey, Catalogue 87-504.

(1) These travellers had Saskatchewan as their main destination. Of the additional 63,000 person-trips which stayed at least one night in Saskatchewan on their way to other destinations, are included. 3.6% of Ontario out-of-province travellers to Canada stayed at least one night in the province.

2.3 Motivators for Pleasure Trips to Saskatchewan by Ontario Residents

Table 11 shows the activities which comprised the main travel purposes of Ontario residents travelling to Saskatchewan on their most recent pleasure trip. The main activities which are pursued in Saskatchewan by Ontario residents include primarily urban and rural sightseeing, fishing and camping.

Saskatchewan tends to attract the outdoor-oriented pleasure traveller from Ontario. Table 12 further illustrates what activities Ontario residents look for on a pleasure trip relative to the activities they undertake in Saskatchewan. As Table 12 shows, although Ontario travellers rank rural sightseeing, visiting historic sites, attending festivals/events, etc., high on their preferred activities, while in Saskatchewan their participation is low in the activities they enjoy doing.

TABLE 11

Main Purpose or Activity Pursued on Last Pleasure Trip to Saskatchewan

Purpose	All Province[1] Average	Ontario[2]	B.C.[3]	Alberta[3]	Manitoba[3]
Rural Sightseeing	30%	36%	24%	26%	33%
Historical Sites	14%	10%	5%	21%	20%
Urban Sightseeing	30%	39%	24%	29%	27%
Festivals	4%	2%	2%	6%	7%
Camping	18%	14%	12%	25%	22%
Water Sports	7%	2%	7%	10%	7%
Sporting Events	6%	1%	2%	8%	12%
Musical Events	5%	7%	2%	3%	6%
Fishing	13%	14%	12%	15%	11%
Hiking	8%	13%	7%	7%	4%
Craft/Art Fairs	2%	0%	5%	1%	1%
Downhill Skiing	3%	0%	5%	3%	3%
Industrial Tours	3%	2%	2%	3%	4%
Cross-Country Skiing	2%	0%	2%	3%	1%
Sailing	0.5%	1%	0%	1%	0%
Snowmobiling	0.25%	0%	0%	1%	0%
Wilderness Canoeing	3%	8%	0%	3%	0%
Big Game Hunting	2%	0%	2%	1%	4%
Game Bird Hunting	3%	1%	2%	7%	0%

[1]Average for all four provinces.
[2]Mid-Continent Research Inc. study of the Ontario market.
[3]Derek Murray and Associates Inc. study of the British Columbia, Alberta and Manitoba markets.

TABLE 12

Comparison of Activities Sought on a Pleasure Trip by Ontario Residents and Their Activity Participation in Saskatchewan

Activities Sought by Ontario Residents on a Pleasure Trip		Ontario Visitors Who Participate in Saskatchewan in These Activities
Rural Sigthseeing	81%	36%
Historical Sites/Museums	78%	10%
Urban Sightseeing	79%	39%
Festivals/Events	68%	2%
Musical Events	61%	7%
Craft and Art Fairs	47%	0%
Camping	36%	14%
Water Sports	40%	2%
Sporting Events	32%	1%
Hiking	29%	13%
Fishing	22%	14%
Industrial Trous	22%	2%
Downhill Skiing	17%	0%
Sailing	22%	1%
Wilderness Canoeing	19%	8%
Cross-Country Skiing	18%	0%
Snowmobiling	13%	0%
Game Bird Hunting	8%	1%
Big Game Hunting	7%	0%

2.4 Length of Stay by Ontario Visitors to Saskatchewan

Table 5 shows that 40% of Ontario pleasure travellers normally take at least one pleasure trip lasting four or more nights away from home to other Canadian provinces. Table 13 shows that of all Ontario travellers taking overnight trips to Saskatchewan, 26% stayed at least four nights on their last pleasure trip to Saskatchewan.

TABLE 13

Percent of Overnight Trips Taken by Ontario Travellers Lasting at Least Four or More Nights Away From Home

Length of Trip	Canadian Destinations	Saskatchewan
Three Nights or Less	60%	74%
Four or More Nights	40%	26%

Ontario residents on their last pleasure trip to Saskatchewan, tended to spend fewer than four or more nights duration trips in Saskatchewan than they did in other Canadian destinations. In spite of this, their average length of stay is longer than those of Alberta or Manitoba residents due to less pass-through traffic of 0 nights. Only 11% of Ontario travellers did not overnight in Saskatchewan as compared to 25% of Manitobans staying no nights and 16% of Alberta visitors staying one or no nights.

According to the 1982 Canadian Travel Survey, the following is a distribution of overnight trips and day trips to Saskatchewan from British Columbia, Alberta, Manitoba and Ontario.

TABLE 14

Distribution of Overnight and Day Trips to Saskatchewan, 1982

Province	Overnight Trips[1]	Day Trips	All Person-Trips	Day Trips
British Columbia	130,000	0	130,000	0%
Alberta	500,000	30,000	530,000	5.7%
Manitoba	227,000	68,000	295,000	23.1%
Ontario	75,000	0	75,000	0%

[1]Where Saskatchewan is the main destination. It excludes trips by residents of those provinces who stayed in Saskatchewan for at least one night on their way to other destinations.

2.5 Type of Accommodation Used by Ontario Residents on Trips to Saskatchewan

In general, Ontario tourists tend to stay more often with friends and relatives and to use hotel/motel accommodation when travelling in Canada, than do residents of Alberta, Manitoba or British Columbia. This is primarily due to the fact that Ontario pleasure travellers tend not to use camping on Canadian pleasure trips to any great extent.

TABLE 15

Type of Accommodation Used by Ontario Travellers in Canada and in Saskatchewan

Accommodation	Canadian Destination	Saskatchewan
Hotels/Motels	47%	54%
Friends/Relatives	42%	21%
Camping	4%	10%
Resorts	4%	-
Bed-Breakfast	3%	-
Other	10%	6%
Passed-Through	-	11%

In the case of travel to Saskatchewan, Ontario residents tend to stay more in hotels/motels and in campgrounds. This is in spite of the fact that Ontarians are primarily motivated to visit Saskatchewan for purposes of visiting friends or relatives.

According to the 1982 Canadian Travel Survey, fully 74% of all Ontario resident person-trips to Saskatchewan are for the primary purpose of visiting friends and relatives. This is a significantly higher proportion than all other Canadian visitors to Saskatchewan. About 16% of trips by Ontarians to Saskatchewan were for pleasure in 1982, and about 10% were for business purposes.

2.6 Mode of Travel Used by Ontario Residents When Travelling to Saskatchewan

Table 6 noted that Ontario residents display a significantly greater tendency to use airlines when travelling to Canadian destinations as compared to Alberta, British Columbia and Manitoba.

Trips taken to Saskatchewan by Ontario residents, however, are still very strongly-oriented to the use of the private automobile as the primary transportation mode. Table 16 compares mode of transport used by Ontario pleasure travellers to all Canadian destinations and to Saskatchewan.

TABLE 16

Modes of Transport Used by Ontario Pleasure Travellers on Out-of-Province Trips in Canada and to Saskatchewan

Transport Mode	Trips in Canada	Trips to Saskatchewan
Automobile	26%	60%
Airplane	82%	15%
Train	8%	20%
Bus	7%	9%
Other	6%	-

2.7 Party Size Characteristics of Ontario Residents Travelling to Saskatchewan

From Ontario, according to the 1980 Canadian Travel Survey, the average party size was 1.5 people to Saskatchewan. This was well below the average party size from British Columbia, Alberta or Manitoba. According to the 1983 Mid-Continent study of the Ontario market, the average party size was 2.8.

TABLE 17

Party Size of Ontario Pleasure Travellers to Saskatchewan

Party Size	Percent
1	23
2	31
3	19
4	15
5	3
6 or more	10
Average	**2.8**

TABLE 18

Comparison of Party Size for Ontario,
British Columbia, Alberta and Manitoba

Province	Average Party Size
British Columbia	3.2
Alberta	3.5
Manitoba	3.2
Ontario	2.8

2.8 Travel Market Image of Saskatchewan as Held by Ontario Residents

Approximately 48% of Ontario residents gave Saskatchewan a positive rating. This compares to the positive image which was given to Saskatchewan, when averaged, by residents of Manitoba, Alberta and British Columbia.

The main difference between the Ontario market and the Western Canada market is that 23% of Ontario residents gave Saskatchewan a negative image as compared to a 44% negative rating by the three western provinces, excluding Saskatchewan.

The second main difference between the Ontario market and the Western Canada market, is that 21% of Ontario residents stated "don't know anything about it/have no idea what it's like."

Ontario residents tend to view Saskatchewan positively in terms of open space, scenery and friendly people. The most negative perception held about Saskatchewan was that it is very flat and uninteresting with no pretty scenery.

When asked to describe Saskatchewan as a place for pleasure or business travel, 40% of Ontario residents gave it a favourable rating, 32% an unfavourable rating, while 30% "did not know" or "did not know anything about Saskatchewan".

Table 19 and Table 20 provide a detailed breakdown of Ontario residents image or perception of Saskatchewan.

TABLE 19

Perceptions Held of Saskatchewan by Ontario Residents - If Asked by a Friend

Favourable Mentions	48%
° Just wilderness I suppose/Full of prairies and open space/ Prairies and flat country like Montana/North Dakota	17%
° Nice place to go/Great place to spend a week/Been there and would recommend going there/You should visit there, check it out/A nice place to visit	11%
° I heard it's beautiful/I think it is real pretty in the summer/It has a lot of scenery/Very scenic/It is a very pretty place/The scenery is beautiful	7%
° There's farming there/Good farm land/Agricultural area/It's grain country/Grow a lot of wheat	13%
° I'd love to go there/I'd like to go there/I would like to see it	6%
° Good fishing/Good hunting/Good fishing and hunting	2%
° Friendly people/The people are hospitable/Friendly/Nice people	3%
° Have relatives there/Was born there/Own property there/ Have friends there	2%
° Regina is a very interesting place to visit/Regina is worth a visit/I liked Regina/Regina is a nice city	2%
° Mentioned a specific thing to see/Place to see/Thing to do	1%
° Lots of things to do there/Lots to see/Lots of shops	1%
° Good lakes/Nice lakes/Lot of lakes/Pig lakes/Cold clear lakes	1%
° Other favourable mentions	5%
Unfavourable Mentions	23%
° It's not really very scenic/Very flat and uninteresting/No pretty scenery	14%
° Very cold in the winter/It's cold/Don't like the cold weather	3%
° Other unfavourable mentions	10%
° I have never been there	24%
° Don't know anything about it/Have no idea what it's like	21%
° Never heard of Saskatchewan	0%

TABLE 20

Perceptions of Saskatchewan as a Place for Pleasure or Business Travel by Ontario Residents

Favourable Mentions	40%
° I understand that Saskatchewan is a beautiful place to travel - lots of scenery/The scenery is very pretty/Very nice countryside/The pretty scenery/Beautiful like the rest of Canada	5%
° Fine for pleasure/It would be a pleasure to go there/I'd like to go there/For pleasure, it's great/Good place to get away from it all/ Definitely a relaxing place to go	9%
° Nice place/Hear it's a nice place to go/Friends and relatives like it/ Sounds like a nice place	9%
° For the sportsman it is great/It's probably good duck hunting/It's good hunting territory/Probably outdoorsy/Good fishing and hunting	5%
° Should be suitable for business/Very good place for business	8%
° Plenty of things to see/Good for sightseeing/Interesting place to visit/ Interesting to go there	5%
° Nice people there/People are friendly/Hospitable	2%
° Farm country/Lots of wheat fields/It's got a lot of farm land	4%
° Seen advertisements/On TV looks like a nice place to visit/Recall some advertisements for there	-
° Clean/Clean - no litter/Clean and tidy countryside	1%
° Lakes/Nice lakes/Have lots of lakes	1%
° I think of the wilderness/It is fairly wilderness yet - we like the wilderness and camping	-
° Other favourable mentions	3%
° It's okay/All right/It's average/Can't be too bad/Sounds okay	3%
Unfavourable Mentions	32%
° No attraction for me to go there - not too much to do/Not my kind of place/Nothing there I like to do or see	16%
° I wouldn't go there/Not interested/Not a place I would want to be (no reason given)	5%
° Flat/Just prairies	3%
° Don't like the scenery/Not pretty scenery there	2%

TABLE 20 (cont'd)

Unfavourable Mentions

° Prefer somewhere else/like Alberta better/Minnesota is better/ It's not number one on my list	1%
° Other unfavourable mentions	7%
° Don't know/Don't know anything about it	30%

When those Ontario residents who had travelled on a pleasure trip to Saskatchewan were asked to describe what they liked best about the province, "scenery" and "nice/friendly people" were the most often mentioned as is outlined in Table 21. When they were asked what they liked the least about their pleasure trip to Saskatchewan, "weather" and "flat countryside" were most frequently mentioned factors as noted in Table 22.

TABLE 21

Positive Impressions of Saskatchewan Held by Ontario Residents Based on Most Recent Trip to Saskatchewan

Aspects Liked Best	Percent
Liked Everything	50
The Scenery	33
Nice/Friendly People	22
Specific Place or Event	21
Visiting Friends/Relatives	10
Good Fishing	1
Clean Cities	2

TABLE 22

Negative Impressions of Saskatchewan Held by Ontario Residents Based on Most Recent Trip to Saskatchewan

Aspects Liked Least	Percent
Nothing Liked	6
Flat Countryside	18
Rainy/Windy/Cold Weather	22
High Costs	1

Saskatchewan's market image in Ontario can be summarized as follows:

- A high level of lack of awareness (30%) of Saskatchewan in general and more specifically what Saskatchewan offers in terms of tourism attractions and services for pleasure or business travel.

- As a destination for pleasure or business travel 40% of Ontario residents gave Saskatchewan a favourable rating which is comparable with a 39% favourable rating by B.C. residents, but below Manitoba's 45% and Alberta's 44% favourable rating.

- Those Ontario residents who visited Saskatchewan rate the province highly on its scenery and friendly people. Of the aspects least liked, these Ontario residents were most likely to dislike the weather and flat countryside.

- The most significant negative image which Saskatchewan has to overcome in the Ontario marketplace is the perception of lack of "attractions" and lack of "natural scenery."

2.9 Business Travel Markets for Saskatchewan

According to the Canadian Travel Survey, Ontario generated 7,000 business person-trips to Saskatchewan in 1982 for which Saskatchewan was the main destination. Of these 7,000 person-trips, 3,000 were primarily attending a convention.

Another 11,000 person-trips, of at least one night's duration by Ontarians, were undertaken to Saskatchewan but whose main destination was another province and not Saskatchewan.

In 1980, Ontarians undertook 24,000 person-trips to Saskatchewan whose primary purpose was business. Obviously, business travel from Ontario declined to Saskatchewan between 1980 - 1982. This decline can be attributed to the Canadian recession for the years 1981 - 1983.

Given the current economic recovery and a more optimistic attitude, it is safe to assume that business travel to Saskatchewan from Ontario will not only reach the 1980 level, but it should surpass this level. The new marketing of business travel in Canada, the publishing of Saskatchewan's first facilities guide and the special promotions of the Business Travel Unit of Tourism and Small Business should provide an additional stimulus to encourage increased business travel to Saskatchewan from the Ontario marketplace.

3.0 POTENTIAL MARKET FOR TRAVEL TO SASKATCHEWAN

The previous two chapters of this report described a number of characteristics typical of the Ontario out-of-province travel market and examined Saskatchewan's past level of performance in the market in terms of market share and market image.

It was noted, for example, that Saskatchewan, in 1982, captured 2% (75,000 person-trips) of the out-of-province travel by Ontario residents within Canada. In 1980, 64,000 Ontario residents visited Saskatchewan or 1.7% of all out-of-province trips by Ontario residents to out-of-province Canadian destinations. Although Saskatchewan's marketing/promotional efforts in the Ontario marketplace have been minimal, Saskatchewan did attain a marginal increase in the share of the Ontario tourism market. The main obstacle to penetrating the Ontario market is the distance to market factor.

Ontario residents are interested in a variety of pleasure travel activities such as rural sightseeing, urban sightseeing, visiting historical sites/museums, attending festivities and events, and craft and art fairs. Saskatchewan cannot compete in the Ontario market for urban sightseeing or for visiting historical sites/museums since larger urban centres and more developed historical sites exist in closer proximity to the Ontario market, such as in Quebec or even Manitoba. Saskatchewan can offer the rural/outdoor experience in the Ontario market. The "Canadian Vacation Travel Market for Saskatchewan" study by Traveldata conducted in 1982 concluded that "particularly to Eastern Canadians, there is a desire to see the Prairies and to sightsee." The study states further that "the lure of the Prairies" in Eastern Canada is an interesting finding. Traditionally, Saskatchewan and other prairie provinces have attempted to counteract the stereotype "flat prairie, grain elevator" image by promoting greenery. However, perhaps Saskatchewan should re-address the traditional appeals of the prairie landscape to Eastern Canadians.

This is not to say that Saskatchewan should promote itself as "flat" since this still is a negative image in the perception of many Ontario residents. Rural sightseeing has to be packaged with a variety of outdoor activities and other natural resources into a package which does not show Saskatchewan as all flat prairie, but a province with a diverse topography, friendly people and a relaxed atmosphere.

3.1 Long-Term Outlook for Growth in Ontario's Out-of-Province Travel Markets

Ontarians took 39.8 million trips in 1982 to all destinations, including foreign destinations. About 81% of these were intraprovincial. Thus, Ontario's capture of its own residents' travel is almost as high as Saskatchewan's. As noted earlier, 75,000 of these total trips were to Saskatchewan as a primary destination.

An additional 63,000 person-trips, according to the Canadian Travel Survey, by Ontarians involved Saskatchewan as an interim destination for at least one night. Therefore, the total visits by Ontarians to Saskatchewan in 1982 was 138,000 person-trips.

In the analysis of the Ontario market undertaken by Thorne, Stevenson & Kellogg for a preparation of the Saskatchewan Tourism Strategy, it was noted that total person-trips by Ontario residents are expected to increase between 2.5 and 5 million from 1982 to 1987. This would represent an increase of 8% to 16% over the five years, or as much as 3% per year.

Figure 2 illustrates the actual and expected volumes of person-trips by Ontario residents. The increases projected in Figure 2 assume that trip-taking will recover as the economy begins to regain former levels. While this is happening, total Ontario person-trips are expected to rebound considerably and thus create opportunities for destinations wishing to increase their share of this market. It should be noted that the Ontario market is one of the more sophisticated markets in Canada. Many of its residents have travelled quite widely. Consequently, many travellers will be interested only in good quality product and good value for money if a destination or facility is to appeal.

After the rebound and over the longer term, it is expected that the travel propensity of Ontario residents will level off. Total person-trips from Ontario are not likely to increase after the beginning of the next decade when trips per capita have about reached their limit and westward migration may begin eating away at the Ontario population. Over the long-term then, the Ontario travel market may hold little potential for Saskatchewan, but over the short-term, the travel growth expected to accompany economic recovery could provide some opportunity for increased market penetration.

3.2 Forecast of Potential Travel Market for Saskatchewan from Ontario to 1987

If Saskatchewan maintained its historical market share of about 2% of Ontario's out-of-province travel markets to Canada, Saskatchewan could expect travel by Ontarians to Saskatchewan to grow from the 75,000 person-trips in 1982 up to 87,000 person-trips in 1987, using the high scenario and up to 81,000 person-trips by 1987, using the low scenario, with Saskatchewan being the main destination.

NOTE: High scenario represents a 16% growth rate.
Low scenario represents an 8% growth rate.

FIGURE 2

Ontario Person-Trips (One or More Nights)

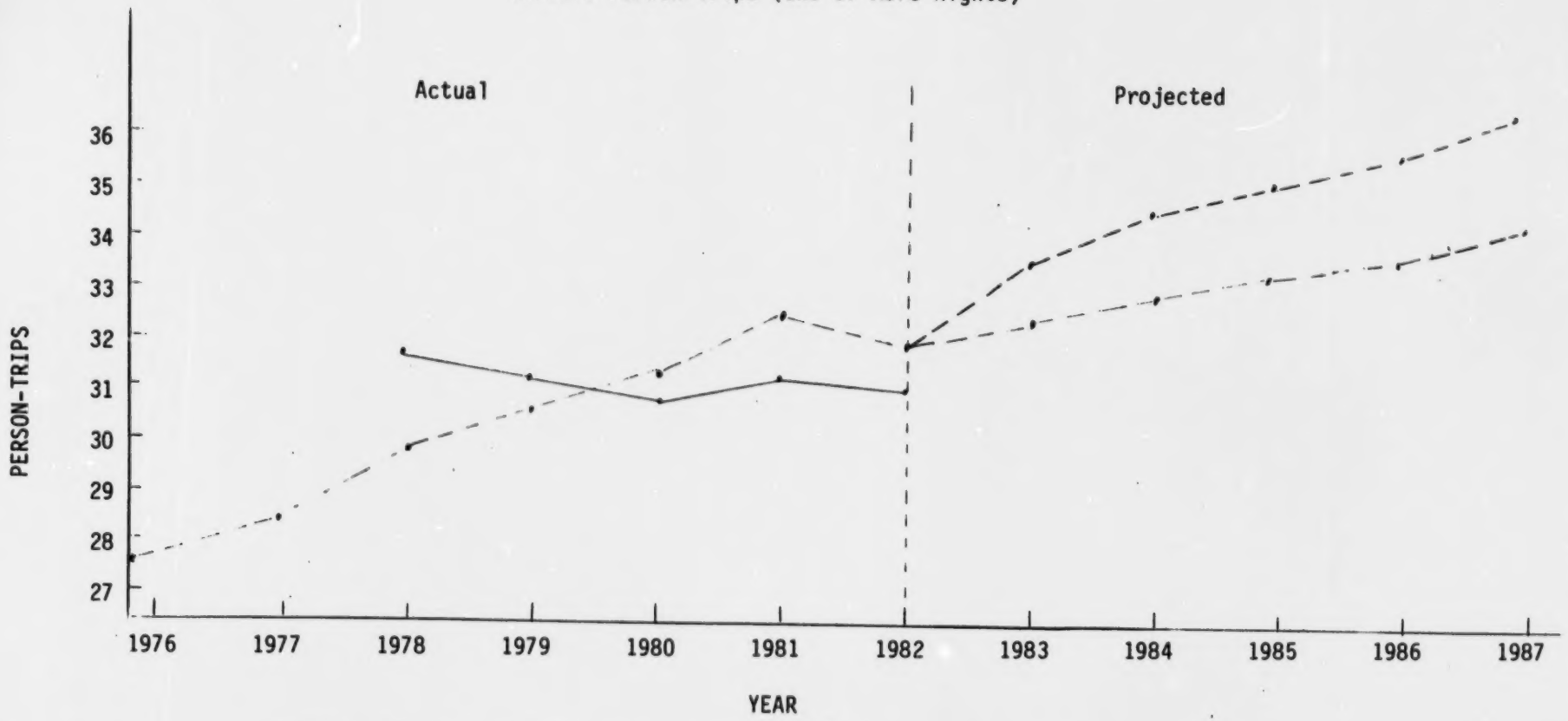


TABLE 23

Ontario Forecasts - Travel Propensity
and Personal Disposal Income

Year	Population[1]	Per Capita Disposal Income[2]		Person-Trips per Capita	
		Low Forecast	High Forecast	Low Forecast 1+ Nights	High Forecast 1+ Nights
1976	8,264,500	4001	4001	3.35	3.35
1977	8,354,900	4067	4067	3.40	3.40
1978	8,444,100	4146	4146	3.50	3.50
1979	8,504,200	4222	4222	3.57	3.57
1980	8,573,800	4277	4277	3.60	3.60
1981	8,624,700	4366	4366	3.70	3.70
1982	8,699,500	4288	4288	3.61	3.61
1983	8,770,000	4321	4422	3.63	3.74
1984	8,841,000	4327	4479	3.64	3.78
1985	8,912,600	4332	4536	3.64	3.82
1986	8,984,800	4338	4593	3.64	3.86
1987	9,057,600	4343	4650	3.65	3.92

[1]Statistics Canada (1975 - 1982). Estimates for remaining years from Canada's Population Outlook. David Foot, Canadian Institute of Economic Policy, Ottawa, 1982.

[2]Thorne Stevenson & Kellogg. Saskatchewan Tourism Strategy. Statistics Canada (1976 - 1982). TSK estimates for remaining years.

The Ontario survey conducted by Mid-Continent Research, Inc. in 1983 found that 15% of Ontarians were either "very" or "somewhat" likely to travel to Saskatchewan on a pleasure trip in the next year or two. This level of interest in travel to Saskatchewan was significantly lower than the likelihood expressed by Alberta, Manitoba and British Columbia residents.

TABLE 24

Percent of Ontario, British Columbia, Alberta and Manitoba Indicating Likelihood of Visit to Saskatchewan in the Next Year or Two[1]

Level of Likelihood	Ontario	B.C.	Alberta	Manitoba
Very Likely	7%	10%	19%	24%
Somewhat Likely	8%	17%	19%	22%
Total % Disposed to Travel to Saskatchewan	15%	27%	38%	46%

[1]The Ontario study was conducted in 1983 and the study of the three Western provinces was conducted in 1984.

Applying these percentages to Ontario's 1982 out-of-province travel propensity to Saskatchewan, they translate approximately to 107,000 person-trips to Saskatchewan under the ideal conditions by 1987. Given, however, that ideal conditions very seldom exist in the real world, a more realistic expectation is 90,000 person-trips by 1987. The Mid-Continent survey closely approximates the high scenario as prepared by Thorne, Stevenson & Kellogg.

This is not to say that Saskatchewan cannot achieve over the 100,000 tourist visitations, with Saskatchewan being the main destination, given a strong marketing presence in Ontario directed at the proper vertical and horizontal market segments together with an improved quality tourism product.

3.3 Reasons for Likelihood of Ontario Residents to Visit Saskatchewan

The 1983 market survey conducted by Mid-Continent Research, Inc., also examined the "reasons" that Ontario residents stated they were either likely or not likely to visit Saskatchewan. The reasons given for probable travel to Saskatchewan by Ontarians were, in order of importance: some place different to go, visiting friends and/or relatives and "passing through" Saskatchewan to another destination.

TABLE 25

Reasons Ontario Residents are Likely to Travel
to Saskatchewan in the Next Year or Two
(All Mentions)

Reasons	Percent
Explore New Place/See the Scenery	4
Visit Friends/Relatives	4
"Passing Through"	4
Camping/Touring	3
Go Every Year	1
Other	1
Total	**17**

Ontario residents who reported being unlikely to visit Saskatchewan felt this way for the following reasons: nothing to do there/rather go someplace else first; no interest in visiting Saskatchewan; no friends or relatives to visit there; and lack of money.

TABLE 26

Reasons Ontario Residents are Not Likely to Travel
to Saskatchewan in the Next Year or Two
(Total Mentions)

Reasons	Percent
Rather Go Somewhere Else/Nothing to do There	23
No Interest	23
No Relatives/Friends	14
Money Problems	6
Lack of Knowledge About Saskatchewan	3
No Time/Too Busy	4
Too Old/Health Reasons	3
Too Far Away	3
Other	5
Total	**84**

In terms of those who reported that they were "not too likely" to visit Saskatchewan, only 3% stated that it was due to lack of knowledge. The predominant reasons, such as "nothing to do/rather go somewhere else" and "no interest in going there" are probably in all likelihood attributable to a lack of knowledge about Saskatchewan's tourism attributes and to no significant marketing/promotional efforts in the Ontario marketplace.

According to the Canadian Travel Survey, Saskatchewan, in 1982, was the prime destination for 75,000 Ontario person-trips. An additional 63,000 Ontario residents stayed in Saskatchewan for at least one night on their way to other Canadian destinations, giving a 46% "pass-through" rate for Saskatchewan. The 1983 Mid-Continent Ontario market study found that 4% of the Ontario pleasure travellers reported intentions of passing through Saskatchewan.

Applying this percentage to the out-of-province trips per capita to Canadian destinations, yields an annual pass-through market of 77,200 person-trips. If Saskatchewan could extend the stay of this Ontario pass-through market by 1 night per person-trip, this would produce an increase for Saskatchewan of at least $2.3 million annually.

3.4 Factors Most Likely to Influence Travel by Ontarians to Saskatchewan

Table 27 shows the factors which would motivate Ontario residents to travel to Saskatchewan in the next year or two. The main motivator would be to visit with friends or relatives which is also the main motivators for Ontarians currently coming to Saskatchewan. Other motivators include a price for value package tour, a special major event such as one comparable to the Calgary Stampede, recommendation by a friend/relative, etc. Only 2% mentioned they would be influenced by more specific information about activities/sightseeing opportunities and 1% mentioned brochures or other forms of advertising/promotion.

TABLE 27

Factors Most Likely to Influence Travel to Saskatchewan by Ontarians in Next Year or Two (Total Mentions)

Factor	Percent
If I Had Friends/Relatives to Visit	16
If Friends/Relatives Were Going	3
A Good Fishing or Hunting Experience	1
Good Priced Package Tour	5
More Specific Information	2
Special Event/Activity	4
Curiosity/Just to go There	4
Brochure/Advertising/Promotion	1
Someone's Recommendation	4
Extra Cash	16
If Remarkable Scenery was Available	1
Nothing	24
Other	18
Don't Know	10
Total	**109**

3.5 Potential Size of Markets for Specific Activities

Table 28 provides a breakdown of the potential size of the market in Ontario for specific Saskatchewan activities. Table 28 shows that the promotion of a package of specific activities/attractions can be associated with influencing a greater influx of Ontario visitors to Saskatchewan. Specific activities/attractions such as rural sightseeing, camping, fishing, wilderness canoeing and historical sites/museums should be packaged for the Ontario market and promoted as a "cluster" and not as separate activities.

TABLE 28

Existing and Projected Growth to 1987 in the Ontario Market for Selected Pleasure Travel Activities in Saskatchewan

Travel Activity	Ontario Residents Interested in Activity	Size of Market in 1983 Person-Trips[1]	Existing Market Captured	Projected Maximum Market Available by 1987 for Sask.	Increase
Rural Sightseeing	81%	27,000	36%	32,400	5,400
Historical Sites	78%	7,500	10%	9,000	1,500
Urban Sightseeing	79%	29,250	39%	35,100	5,850
Festivals/Events	68%	1,500	2%	1,800	300
Camping	36%	10,500	14%	12,600	2,100
Water Sports	40%	1,500	2%	1,800	300
Sporting Events	32%	750	1%	900	150
Musical Events	61%	5,250	7%	6,300	1,050
Fishing	22%	10,500	14%	12,600	2,100
Hiking	29%	9,750	13%	11,700	1,950
Craft/Art Fairs	47%	-	0%	-	-
Downhill Skiing	17%	-	0%	-	-
Industrial Tours	22%	1,500	2%	1,800	300
Cross-Country Skiing	18%	-	0%	-	-
Sailing	22%	750	1%	900	150
Snowmobiling	13%	-	0%	-	-
Wilderness Canoeing	19%	6,000	8%	7,200	1,200
Big Game Hunting	7%	-	0%	-	-
Game Bird Hunting	8%	750	1%	900	150

[1]Based on 75,000 person-trips which include Saskatchewan as main destination.

3.6 Characteristics of Ontario Visitors to Saskatchewan

According to the Canadian Travel Survey:

- Ontario visitors appear to be relatively younger than other visitors with about 21% in the under 15-year category and another 28% between the ages of 15 and 24 years. About 32% of Ontarian visitors in 1983 were between the ages of 25 and 54 years, and 19% were 55 or more years old.

- Ontario visitors appear to have the highest relative percentage in the greater than $30,000 income bracket. Seventy-two percent of Ontarians claimed incomes in this category. About 3% earned between $20,000 and $29,999. Only 1% had incomes of less than $20,000. The remainder refused to answer the income questions.

4.0 CONSIDERATIONS AND IMPLICATIONS FOR MARKETING AND PROMOTIONAL STRATEGIES

Previous chapters of this report have noted a number of important aspects of the Ontario travel market for Saskatchewan. The primary reason why Ontarians visit Saskatchewan is for purposes of visiting with friends and/or relatives (VFR). Although Ontarians reported having a wide-range of pleasure travel interests, they tend to pursue only a few predominant activities when travelling in Saskatchewan such as rural sightseeing, camping, fishing, wilderness canoeing, historical sites/museums and urban sightseeing.

Forecasts of the potential travel volumes to Saskatchewan from Ontario found that there is likely to be a significant growth occurring in the Ontario travel marketplace over the next several years and that marketing activities undertaken prior to 1987 should provide Saskatchewan with a reasonable opportunity to increase its share of the growing Ontario travel market. It was estimated that travel could potentially increase from the 75,000 person-trips per year, to about 90,000 to 100,000 person-trips per year by 1987. In addition, the "pass-through" market for those Ontario travellers who spent at least one night in Saskatchewan on their way to other destinations could increase from the current 63,000 person-trips to more than 77,000 person-trips by 1987. Capturing this increased available "destination Saskatchewan" and "pass-through" traffic will depend upon the marketing of those attractions and activities for pleasure travel in Saskatchewan which can increase person-trips, trip expenditures and length of stay. Aside from VFR motivated travel, the best potential attractions identified to stimulate increased pleasure travel to Saskatchewan were a series of specific activities such as rural sightseeing, camping, fishing, wilderness canoeing, and historical sites/museums.

4.1 Improvements Required to Saskatchewan's Market Image in Ontario

Ontarians generally see Saskatchewan as a place to visit friends/relatives, to camp, fish and for rural sightseeing.

At the same time, many Ontarians perceive Saskatchewan as being "flat", "boring" and as many as 21% of Ontario residents have "no image" of Saskatchewan. A large proportion of Ontario residents also do not perceive Saskatchewan as having any significant attractions.

There is a need to create an image of Saskatchewan as a desirable place to vacation in on the basis of Saskatchewan's tourism resources and attractions. This will require the diversity of Saskatchewan's natural resources, friendly people, uncrowded countryside, and specific places and attractions for pursuing activities which are of interest to the Ontario traveller.

4.2 Existing Awareness of Specific Attractions

Table 29 shows the awareness of selected Saskatchewan attractions in the Ontario market.

TABLE 29

Awareness of Saskatchewan Places, Attractions and Events by Ontarians

Place/Attraction/Event	Level of Awareness
Regina	97%
Saskatoon	93%
Moose Jaw	92%
Regina Royal Canadian Mounted Police Training Depot and Museum	55%
Pioneer Days, Saskatoon	47%
Churchill River	55%
Prince Albert National Park/ Waskesiu	48%
Moose Mountain Provincial Park/ Kenosee	31%
Grasslands	28%
Regina Buffalo Days Exhibition	23%
Cypress Hills Provincial Park	24%
Lake Diefenbaker	30%
Lac La Ronge Provincial Park	23%
Qu'Appelle Valley	17%
Fort Walsh National Historic Park	15%
Batoche	13%
None of These - Not Heard of Any	1%

The cities enjoy the highest level of awareness in Ontario, although this does not mean Ontario residents will travel specifically to Saskatchewan to see Regina, Saskatoon or Moose Jaw.

It is interesting to note that natural features such as the Qu'Appelle Valley have a low level of awareness which, in part, contributes to the flat and uninteresting image many Ontario residents hold of Saskatchewan. Historic sites such as Fort Walsh and Batoche also have a low level of awareness.

This would suggest that Saskatchewan's marketing/promotional activities focus first on creating a favourable or positive image of Saskatchewan as a desirable vacation place with a wide-range of topography and "things to do and see". The second marketing/promotional thrust should be on specific activities:

- visiting friends and relatives
- rural sightseeing
- fishing
- camping
- wilderness canoeing
- special major events
- specific attractions in Regina and Saskatoon

4.3 Promotional Media for Encouraging Travel to Saskatchewan by Ontario Residents

Table 30 shows the sources of ideas about places to go for pleasure travel as reported by Ontarians in the 1983 study. As expected, word of mouth references from friends or relatives is the most dominant factor in terms of where people got their ideas for pleasure travel. Newspaper, travel agents and magazines followed in second, third and fourth order of importance.

TABLE 30

Source of Ideas About Places to Go

Source	Percent
Friends/Relatives	56
Newspapers	25
Magazines	15
Travel Agency/Travel Brochures	18
Television	7
Decide Myself/Our Own Ideas/What We Want to do/Where We Want to go	10
In the Mail	1
Radio	3
Chamber of Commerce/Travel Show/ Information Booth/Tours Through	3
Books/The Library/Encyclopedias	3
Automobile Club	2
Visit Relatives/Visit Family	1
Other Mentions	+
Don't Know	1

Tables 31, 32 and 33 illustrate the type of media Ontario residents read or listen to.

TABLE 31

Daily Newspaper Ontarians Read on a Regular Basis

Newspaper	Percent	City Size					Income				Sex	
		Under 5000	5 to 50M	50 to 100M	100 to 500M	500M Over	Under 20000	20000-29999	30000-39999	40000 Over	Men	Women
Toronto Star	33	10%	13%	21%	12%	58%	39%	17%	29%	35%	34%	33%
Toronto Globe & Mail	26	10%	43%	8%	21%	32%	25%	21%	11%	38%	31%	24%
Hamilton Spectator	24	-	38%	-	40%	10%	28%	25%	33%	16%	22%	25%
Ottawa Citizen	21	10%	18%	4%	33%	11%	10%	27%	12%	32%	15%	24%
Toronto Sun	14	-	13%	-	8%	23%	15%	25%	21%	14%	18%	13%
Windsor Star	4	-	-	-	9%	-	7%	0%	0%	2%	3%	4%
London Free Press	2	-	-	-	4%	2%	7%	2%	3%	1%	2%	3%
Sault Daily Start	2	35%	-	38%	-	-	2%	7%	3%	2%	3%	2%
Peterborough Examiner	1	10%	-	33%	-	-	1%	4%	1%	-	-	2%
Other Mentions	7	25%	6%	4%	6%	8%	16%	11%	6%	6%	7%	6%
None - Don't Read a Daily Newspaper	4	20%	6%	13%	2%	5%	11%	4%	1%	-	12%	1%

TABLE 32

Magazines Read Regularly by Ontario Residents

Magazine	Percent
Sports Illustrated	32
Readers Digest	13
Time	12
Maclean's	20
National Geographic	9
Newsweek	5
Women's Magazines	8
Regional Magazines	6
Good Housekeeping	2
Home and Garden Magazines	7
Sports Magazines	2
McCall's	1
Better Homes and Gardens	1
General Interest Magazines	4
Ladies Home Journal	1
Business and Finance Magazines	3
People	2
Science Magazines	1
U.S. News & World Report	-
Trade, Technical and Professional Journals	2
Cosmopolitan	2
Family Circle	1
Redbook	+
Woman's Day	1
Outdoor Life	1
Life	1

TABLE 33

Radio Stations Listened Most Often by Ontario Residents

Radio Station	Percent	City Size					Income				Sex	
		Under 5000	5 to 50M	50 to 100M	100 to 500M	500M Over	Under 20000	20000-29999	30000-39999	40000 Over	Men	Women
CHML - AM	6	-	3%	-	11%	2%	15%	12%	-	-	9%	4%
CFRA - AM	5	-	-	-	9%	2%	-	15%	5%	6%	3%	6%
CFRB - AM	4	-	19%	-	-	6%	1%	-	5%	7%	3%	4%
CKOC - AM	3	-	3	-	3%	3%	-	-	11%	-	3%	3%
CFTR - AM	3	-	3%	-	-	6%	10%	-	-	-	3%	3%
CBC - AM	2	5%	3%	-	4%	-	-	2%	-	2%	-	3%
CKWW - AM	1	-	-	-	3%	-	4%	4%	1%	-	2%	1%
CKPT - AM	1	-	-	25%	-	-	-	2%	1%	-	-	1%
Other AM Stations	14	45%	3%	33%	15%	22%	16%	11%	19%	15%	11%	16%
CILQ - FM	5	-	-	-	8%	3%	10%	12%	5%	4%	12%	2%
CENY - FM	5	-	-	-	-	11%	10%	-	5%	6%	2%	6%
CHUM - FM	4	-	13%	-	2%	6%	5%	-	1%	8%	6%	4%
CHEZ - FM	3	-	-	-	5%	2%	-	-	1%	6%	2%	3%
CHFI - FM	2	-	-	-	-	6%	-	-	5%	6%	3%	3%
CFMO - FM	3	-	18%	-	3%	2%	-	-	5%	6%	2%	3%
CING - FM	2	-	3%	4%	2%	2%	1%	2%	-	2%	-	2%
WSUE - FM	1	-	-	17%	-	-	1%	-	2%	-	1%	-
Other FM Stations	25	35%	22%	17%	23%	27%	26%	34%	21%	24%	28%	24%
Don't Know/It Varies	3	10%	6%	4%	4%	2%	1%	2%	1%	1%	-	4%
None - Don't Listen	7	5%	3%	-	7%	8%	1%	2%	11%	8%	9%	6%

4.4 Timing and Promotional Activities

Section 1.2.6 of Chapter 1 of this report, gave details of the summer trip planning characteristics of Ontarians. It was noted that February and March are important months for planning summer pleasure trips with the key month being June.

5.0 CONCLUSIONS

The following conclusions can be drawn about the Ontario market for Saskatchewan based on the data and analysis contained in this report.

5.1 Saskatchewan captures a very small portion of Ontario's out-of-province travel, with the Ontario market more heavily-oriented to Saskatchewan for travel related to VFR as compared to British Columbia, Alberta or Manitoba. Other orientations of the Ontario market to Saskatchewan are for rural/urban sightseeing, camping, fishing, hiking, and wilderness canoeing. Even for these activities, Saskatchewan is not generating the traffic volume from Ontario which Saskatchewan would appear to have the potential to generate.

5.2 Although the Ontario market did not grow significantly in the past few years, it is now increasing and is expected to grow between 8% - 16% by 1987 over the 1982 level. The next three-year period should provide Saskatchewan with a good opportunity to increase its market share from 75,000 person-trips to between 90,000 and 100,000 person-trips. The "pass-through" traffic from Ontario through Saskatchewan to other Canadian destinations provides an additional opportunity for Saskatchewan to increase tourism revenue by encouraging this market segment to stay longer in Saskatchewan.

5.3 The Ontario market is sophisticated in its expectations. To significantly penetrate the Ontario market, Saskatchewan will have to upgrade and build new attractions of national significance as well as upgrade the quality of tourism services, especially in the rural areas of the province and in Northern Saskatchewan for fishing and wilderness canoeing.

5.4 Although Ontario residents have a high awareness of Saskatchewan cities such as Regina, Saskatoon and Moose Jaw, it is highly unlikely that Saskatchewan cities will become travel destinations for Ontario pleasure travellers. Other larger metropolitan cities are located in closer proximity to the Ontario market. Saskatchewan's promotional programs should emphasize the natural, cultural, historical diversity of the province and promote those activities which are a strength in Saskatchewan.

APPENDIX A

METHODOLOGY

THE SAMPLE

Information was required on the travel behaviour of residents of Ontario and especially on those who travel 2,400 km. or more which is of sufficient distance to travel to Saskatchewan.

The study was concerned with trips taken by individuals 18 years of age or older, and data was collected on travel patterns of Ontario residents for the past three years.

A disproportionate sampling procedure was designed to yield a sample of 250 completed interviews for metropolitan and rural Ontario.

The Kish respondent selection system was used to select the proper household member. Six different versions of the Kish respondent selection system were utilized to insure randomness of sample.

To ensure representativeness of the sample, up to three dialing attempts at different times of day and on different days of the week, were made to complete an interview at a designated household. If, after three attempts, an interview could not be completed at a designated household, an alternate was substituted.

For results based on a sample of this size, with a 95% confidence level, the error is $\pm 3\%$.